Greentree®
PRIMED FOR BUSINESS

CUSTOMER RELATIONSHIP MANAGEMENT

BOOKINGS MANAGEMENT

SALES & MARKETING

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CONTACTS & RELATIONSHIPS

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BOOKINGS MANAGEMENT

Key Benefits

- Invitation lists
- Bulk e-mail & mail merges
- Resource planner
- Financial management & profitability
- Direct quotes & invoices
- Reporting
- Security

Comprehensive and integrated co-ordination of events or resource bookings can be a major challenge for many organisations. Greentree's Bookings Management provides a flexible, easy to use and efficient solution for organisations that require co-ordination of events or booking of resources.

Its total integration with other Greentree suites enable Bookings Management to handle all aspects of bookings, including confirmation letters and invoicing where applicable.

The industries and processes that Bookings Management can be applied to are very extensive and include, but are not limited to:

- Corporate Hospitality Management
- Professional Training Courses
- Seminar Logistics & Accommodation
- Venue & Studio Management
- Talent Management
- Camping Sites

Invitation lists

Inviting customers or prospects to a seminar, conference or business development function has never been easier. Bookings Management provides a timesaving tool for creating your event's invitation list, drawing on Contact records in Greentree, using a number of different methods such as Inclusion/Exclusion criteria, amalgamation of existing lists, manual contact selection and with the ability to apply the filtering processes repetitively if required.

> "Greentree's integration and specifically, our use of CRM as our information hub and single data entry point, has effectively automated workflows from end-to-end with significant savings in time and costs – we now spend time managing the possibilities Greentree has created for us."
>
> **Mark Murphy,** Finance Director, Gerard Murphy Plumbing.

Bulk e-mail & mail merges

Bookings Management includes the ability to send selective or bulk emails as well as perform mail merges, which can be extremely useful when issuing invitations or distributing update information for existing bookings.

Emails or form letters sent are recorded as communication records for each recipient, providing the Bookings Co-ordinator with an audit trail of contact and a searchable reference point for future use.

Resource planner

As Bookings are recorded in the system, they are automatically reflected on the Greentree Resource Planner, a simple graphical interface that gives a visual account of resource deployment. Users can drill down to view detailed information about either the attributes or capabilities of the given resource, or the details of the individual Bookings. Your team will quickly warm to the use of the Resource Planner as its calendar format and functionality are very familiar and user friendly.

The Resource Planner can be utilised by a wide array of industries, with its versatility enhanced by several features, including:

- Day or Night orientation for use in an accommodation bookings
- User-defined allowance/disallowance of 'double-bookings' with respect to each resource, or a group of resources
- Seating, Table or Room allocations for conference, seminars or dinner bookings.

Financial management & profitability

When Bookings Management is used for revenue generating activities, the related income and expenses are tracked, and posted to the nominated General Ledger accounts. A financial summary provides the co-ordinator with a breakdown of the activity's profitability compared with the targets specified at the outset.

Direct quotes & invoices

When chargeable Bookings are made, a quote can be generated directly from the Bookings screen. Once the Quote is accepted, an invoice can be automatically generated, and update the customers account in Accounts Receivable.

Reporting

A range of reports are provided, with the capability to select by a wide range of filters, including date ranges, 'Co-ordinated By', 'Approved By', and price level. Users can also design their own reports using the powerful built in Greentree Report Writer, or with external reporting tools that support Open Data Base Connectivity (ODBC).

Security

Bookings Management utilises the highly versatile security structure found in all Greentree modules. When applicable, security administrators can utilise generalised, 'team-based' rules to specify a department or team's ability to either view or edit individual bookings.

WHY GREENTREE?

NO
WALLS we³
More with the power of three

MANY SOFTWARE PACKAGES COME WITH ADD-ONS, COMPROMISES AND HALF-HEARTED SOLUTIONS.

Greentree believes you need the reassurance of business software that is both comprehensive and integrated, breaking down barriers and powering you to get on with business.

Responsive and flexible, Greentree provides you with a wide variety of modules and sub-modules rarely found in other packages. You switch on the pieces you need, effectively matching the system to fit your business. As your business evolves, Greentree grows with you.

Exploit its accuracy in business metrics; challenge its capability to deliver insightful information. Greentree eradicates long, complicated tasks and effortlessly manages change, to help grow business potential.

Whatever the need, Greentree gives you choices that are cost-effective and proven. Thousands of companies, large and small, have at their fingertips Greentree's simple, smart thinking that empowers better decisions, better prospects.

And, with a partnership network that spans many countries, Greentree is totally accessible. Your unique needs will drive the way Greentree and its partners respond to you. If the only thing missing from this equation is your business, then get in touch – after all, three heads are better than one.

GET READY TO BE PRIMED FOR BUSINESS.